



Supports – FSC Job Aid

The *Supports* screen allows users to view, edit, or add Supports to the case. Supports are individuals who support the Participant either in a professional or natural/community support capacity.

Supports

Supports

Support Category *

-Select- ▼

Support Type *

-Select- ▼

Business Name

Prefix

First Name *

Middle Name

Last Name

Birth Date

Legal Sex *

-Select- ▼

SSN

Notes

Email

Active *

-Select- ▼

Address Phone

Address Details

Address Type

Address Summary

Primary

Validated?

No data available in table

Show 10 ▼ entries

First Previous Next Last

Primary Address

-Select- ▼

Address Type *

-Select- ▼

Address 1 *

Address 2

City

County

-Select- ▼

Neighborhood/Municipality

-Select- ▼

State

-Select- ▼

Zip Code *

Extension

Validate Address

New

Save Support

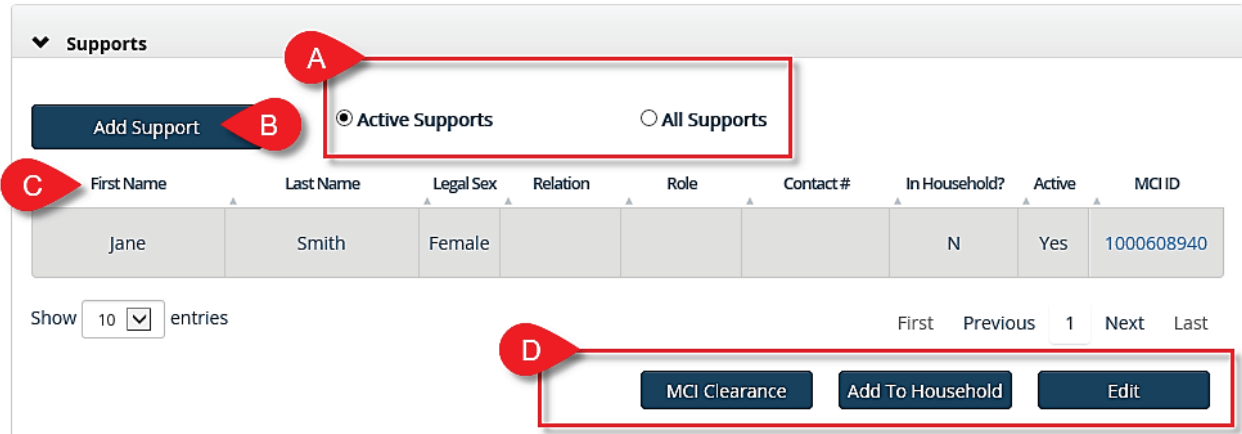
Cancel

Navigation

- From the **Dashboard**: Locate the desired Case and click on the *Case ID* to bring the Case into focus.
 - Click on the **Case Information** tile. Then click on the **Supports** tile.

Supports

- The **Supports** pane allows users to review, edit, MCI clear, add, or deactivate/activate Supports as well as change a Support to a Household Member.



The screenshot shows the 'Supports' pane with the following elements:

- A:** Radio buttons for 'Active Supports' (selected) and 'All Supports'.
- B:** 'Add Support' button.
- C:** Table header and first row of the Supports grid.
- D:** Action buttons: 'MCI Clearance', 'Add To Household', and 'Edit'.

First Name	Last Name	Legal Sex	Relation	Role	Contact #	In Household?	Active	MCI ID
Jane	Smith	Female				N	Yes	1000608940

Below the table, there is a 'Show 10 entries' dropdown and pagination controls: 'First', 'Previous', '1', 'Next', 'Last'.

- The list will default to *Active Supports*. To view both active and deactivated Supports select the **All Supports** radio button.
- To add a new Support click **Add Support**.
- The *Supports* grid contains basic information about the Supports including their *Name*, *Legal Sex*, *Relation* (to the Head of Household), *Role*, *Contact #*, *In Household?* (Y/N), *Active* (Yes/No), and *MCI ID* (if the Support has been MCI Cleared).
- These buttons can be used to run an MCI Clearance on a Support, edit the Support's information, or move a Support to the Household.
 - To use the buttons in this section first select the desired Support from the grid by clicking on that line in the grid.

See **Page 7** of this Job Aid for instructions on how to MCI Clear a Support.

See **Page 10** of this Job Aid for instructions on how add a Support to the Household.

- To view or edit a Support's information, click on the individual's line in the grid and click **Edit**.

- To close the *Supports* pop-up without making any changes click **Cancel**.



Creating a New Support

1. To create a new Support click the **Add Support** button.
2. The *Search Supports* pop-up will appear:

Search Supports

First Name *

Last Name *

Legal Sex *

Birth Date

Synergy Location

Janet

Jones

Female

Synergy

Search

Search Result

MCIID	Collateral Id	First Name	Last Name	Legal Sex	Support Type	Contact #
1000606281	176	JANET	JONES	Female		
1000606377		Janet	Jones	Female		

Show

10

entries

First

Previous

1

Next

Last

Client Information

Contact Information

Notes

Name

Business Name

Support Category

Support Type

JANET JONES

Professional Support

Child Welfare Worker

SSN

Legal Sex

Birth Date

MCI ID

Female

1000606281

Add To Case

Create Support

Close

- a. Enter the *First Name*, *Last Name*, *Legal Gender*, and *Birth Date* (if known).

Note: Do not enter birth dates for Professional Supports.

- b. *Synergy Location*: This drop-down defaults to "Synergy". Supports can be searched for in all of Synergy or only in a specific program such as YSP, HCM, or ITM.
- c. Click the **Search** button to locate possible matches in the system. A list of possible matches will display in the *Search Result* grid. Click on a line in the grid to view that individual's information.



- d. Review the results including the information on the *Client Information*, *Contact Information*, and *Notes* tabs.
 - i. If there is a match in the *Search Result* grid, click the desired person's line in the *Search Result* grid and then click **Add to Case**.
 - ii. If none of the results match the person being added, click **Create Support** without selecting anyone from the *Search Results* grid.
- e. To close the *Search Support* pop-up without adding a support click **Close**.

Completing the Supports pop-up

1. When **Create Support** or **Add to Case** is clicked the *Supports* pop-up will appear.

2. Enter all of the relevant information for this Support in the *Supports* pop-up.
 - a. The Support can be made Active or Inactive at any time by selecting "Yes" or "No" from the *Active* drop-down.
 - b. *Support Category*, *Support Type*, *First Name*, *Legal Sex* and *Active* are all required in order to save a Support entry.



3. When the entire *Supports* pop-up has completed click **Save Support** at the bottom of the pop-up to save the information entered or changed.
4. Clicking **Cancel** at the bottom of the pop-up will close the pop-up without saving any of the information that was entered or changed.
3. *Address* tab: Multiple addresses can be entered for the Support. The Support can also be saved without entering an address.

Address Phone

Address Details

Address Type	Address Summary	Primary	Validated?	
Mailing	1972 Clayton Ave Perry South Pittsburgh,PA, 15214-3808	No	Yes	

Show 10 entries First Previous 1 Next Last

New Address Form (A):

Primary Address: -Select- Address Type: Home Address 1: 123 N Main St Address 2: City: County: -Select- Neighborhood/Municipality: -Select- State: -Select- Zip Code: 15215 Extension:

Buttons: Validate Address (B), New

Search Result (C):

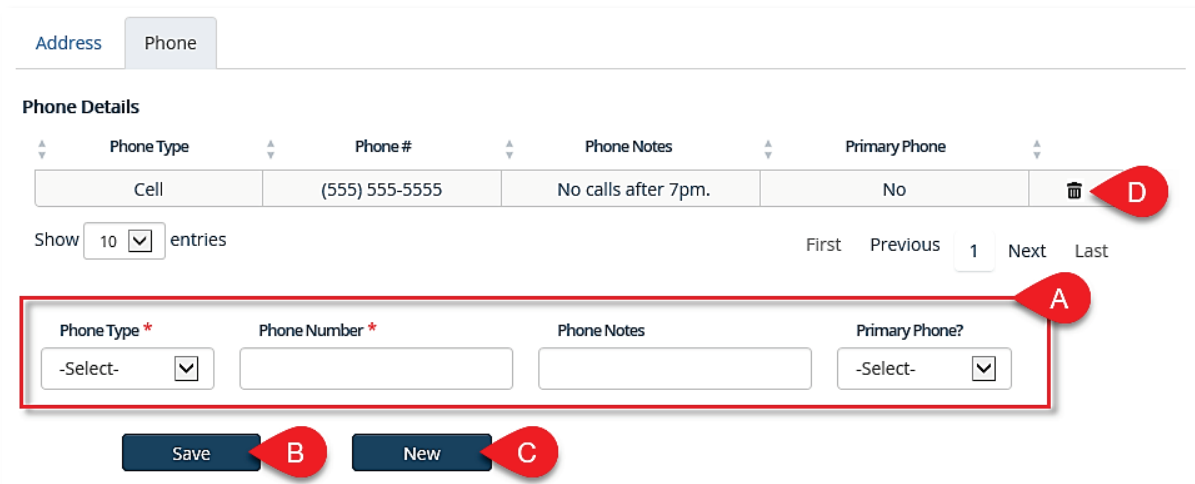
Address Line 1	Address Line 2	Municipality	City	State	Zip Code
123 N Main St		Sharpsburg Borough	Pittsburgh	PA	15215-2018

Show 10 entries First Previous 1 Next Last

Buttons: Select, Create address as entered

- a. To enter a new address:
 - i. Select whether or not the address is the individual's *Primary Address*, select the *Address Type*, and enter all of the known address information.
- b. Click **Validate Address**.
- c. If the *Search Result* list includes the desired address, click on the correct address in the grid and Click **Select**.
 - i. If the Correct address is not in the Search Result list, the *Address Information* can be updated and searched for again. To do so, edit the *Address Information* and click **Validate Address**.

- ii. If, after searching again, the address cannot be located in the *Search Result* list, the address can still be saved without validation by clicking **Create address as entered**. The address will appear in the *Address* grid with a "No" in the *Validated?* column to indicate that the Address has not been validated.
 - d. If an address has been added in error, click the delete icon [] to the right of the address in the *Address* grid to delete.
 - e. To add a new address, click **New**
4. *Phone* tab: Multiple phone numbers can be entered for the Support. The Support can also be saved without entering a phone number.



The screenshot shows the 'Phone' tab interface. At the top, there are two tabs: 'Address' and 'Phone'. Below the tabs is the 'Phone Details' section. It contains a table with columns: Phone Type, Phone #, Phone Notes, and Primary Phone. The table has one row with the following data: Cell, (555) 555-5555, No calls after 7pm., and No. To the right of the table is a delete icon (trash can) labeled 'D'. Below the table is a 'Show 10 entries' dropdown and pagination links: First, Previous, 1, Next, Last. Below the table is a form to add a new phone number. The form has four fields: Phone Type (dropdown menu with '-Select-' selected), Phone Number (text input), Phone Notes (text input), and Primary Phone? (dropdown menu with '-Select-' selected). This form is labeled 'A'. Below the form are two buttons: 'Save' (labeled 'B') and 'New' (labeled 'C').

- a. To add a new phone number, click on the *Phone* tab:
 - i. *Phone Type*: Select the type of phone number being entered.
 - ii. *Phone Number*: Enter the 10 digit phone number.
 - iii. *Phone Notes*: If applicable, enter notes about the phone number.
 - iv. *Primary Phone?*: Use the drop-down to indicate whether or not this phone number is the primary phone number for this Support. Note that only one phone number can be marked as primary at any given time.
- b. Click **Save** to add this phone number to the *Phone* grid.
 - i. To edit an existing phone number, click on the desired number in the grid.
- c. To enter additional phone numbers, click **New**.
- d. If a phone number has been added in error, click the delete icon [] to the right of the phone number in the *Phone* grid to delete it.



MCI (Master Client Index) Clearing Supports

DHS' goal is to ensure that all services, connections, and information for an individual are connected to one ID, the Master Client Index ID (MCI ID).

The MCI Clearance process assists in this by helping to minimize the possibility of duplicate MCI IDs within DHS applications.

Important Note: Only Natural Supports should be MCI cleared. Users should **never** search or attempt to view a Professional Support's Client View information.

- Individuals who have an MCI (Master Client Index) ID in the grid have already been cleared, however they can be re-cleared if necessary. To open the *Client Search* (MCI Clearance) pop-up, select the desired individual in the *Supports* grid and click **MCI Clearance**.

Client Search

Person Search Results
To create new member in MCI and assign it to selected support, click on Create.
Please enter first name, last name, gender and birth date of the support to create the MCI record.

Prefix

First Name

Middle Name

Last Name

Suffix

-Select-

Gender

DOB

SSN

Race

None selected

Create

Potential Matches
To associate an existing MCI member to the selected support, click on Select.

MCI ID

Prefix

First

Middle

Last

Suffix

Gender

DOB

SSN

% Match

Show 10 entries

First Previous 1 Next Last

Select

Detail Information

Client Information

Contact Information

DHS Involvement

MCI ID

Name

DOB

SSN

Gender

Race

Cancel



1. The *Person Search Results* section contains the information that has been entered in this Case for this individual. Compare this information to the *Potential Matches* section.

Person Search Results

To create new member in MCI and assign it to selected support, click on Create.

Please enter first name, last name, gender and birth date of the support to create the MCI record.

Prefix	First Name	Middle Name	Last Name	Suffix
				-Select- v
Gender	DOB	SSN	Race	
v			None selected v	

- a. The *Potential Matches* section contains a grid of all possible matches. Note the *% Match* column. This percentage refers to how likely it is that the desired individual is this person based on the demographic data entered.

Potential Matches

To associate an existing MCI member to the selected support, click on Select.

MCI ID	Prefix	First	Middle	Last	Suffix	Gender	DOB	SSN	% Match
1000608262		October		November		Female	05/06/1998		91

Show entries

First Previous Next Last

- i. To view more information on the Potential Match, click on the person's name in the grid. The *Detail Information* tabs (*Client Information*, *Contact Information* and *DHS Involvement*) will update to include that person's information.

Detail Information

MCI ID	Name	DOB
SSN	Gender	Race



Detail Information

Client Information Contact Information DHS Involvement

Address Summary Primary Phone Type Primary Phone # Email

Detail Information

Client Information Contact Information DHS Involvement

System	Status	Open Date	Case/Referral Last Updated Date	Paid Service Last Updated Date(KIDS-Only)	Referral/Case ID	Worker Name

2. After reviewing the *Person Search Results*, determine whether the individual is one of the potential matches.
 - a. If the desired individual is one of the potential matches, select that Potential Match in the grid and click **Select**.

Note: If there is a Potential Match with a % Match of 95% or higher in the Person Search Results that Potential Match must be selected in order to MCI Clear the individual. Synergy will not allow a new MCI ID to be created.

- b. If the desired individual is NOT one of the potential matches click **Create** to create a new MCI ID for this individual.
 - c. To close the MCI *Client Search* pop-up without creating or selecting an MCI ID, click **Cancel**.



Adding a Support to the Household

1. Adding a Support to Household Members: Use this option if a Support has now become a Household Member.
 - a. Select the Support from the grid and click **Add to Household**.
 - b. A confirmation pop-up will appear:

Confirm

Do you want to add member as household ?

Yes

No

Click **Yes** to add the Support as a Household Member.

Clicking **No** will close the confirmation pop-up without adding the Support as a Household Member.

For more information...

For assistance, please contact the Allegheny County Service Desk at ServiceDesk@AlleghenyCounty.US or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access I-Service, go to: <https://servicedesk.alleghenycounty.us>

This and other Job Aids can be found at: <http://s3.amazonaws.com/dhs-application-support/index.htm>